HORIZON OFFLINE CIRCULATION

PC RELIANCE in the Bookmobile Office

Open PC Reliance

- To open PC Reliance: Double Click on the PC Reliance Icon on desktop (2 arrows – periwinkle and yellow)

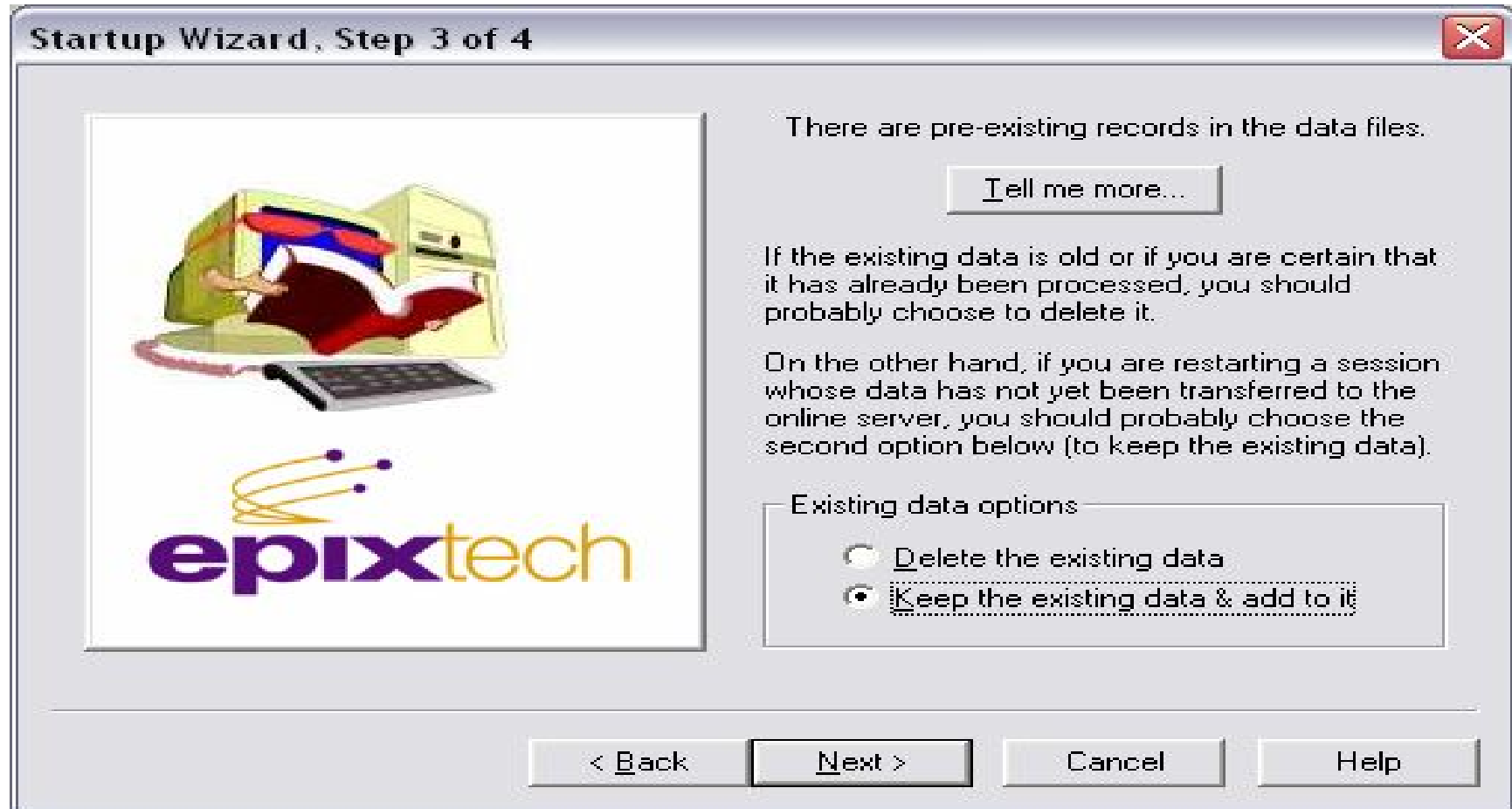- Only use PC Reliance when you are not able to use the Horizon module

Welcome screen – choose Next

Startup Wizard, Step 1 of 4

Welcome to PC Reliance 2.05

Before you begin using PC Reliance, we need to verify a few things to ensure the validity of your data.

When you're ready to move on through the startup process, press the "Next" button below.

epixtech

< Back   Next >   Cancel   Help

Verify Date and Time– Choose Next

If data has been uploaded then delete, if not keep (Computer specific)– Next

Set-up is complete – Choose Finish

Checkout screen is default

Verify due date time period
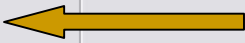
To change/add Due Dates = Tools>Options>Due Dates
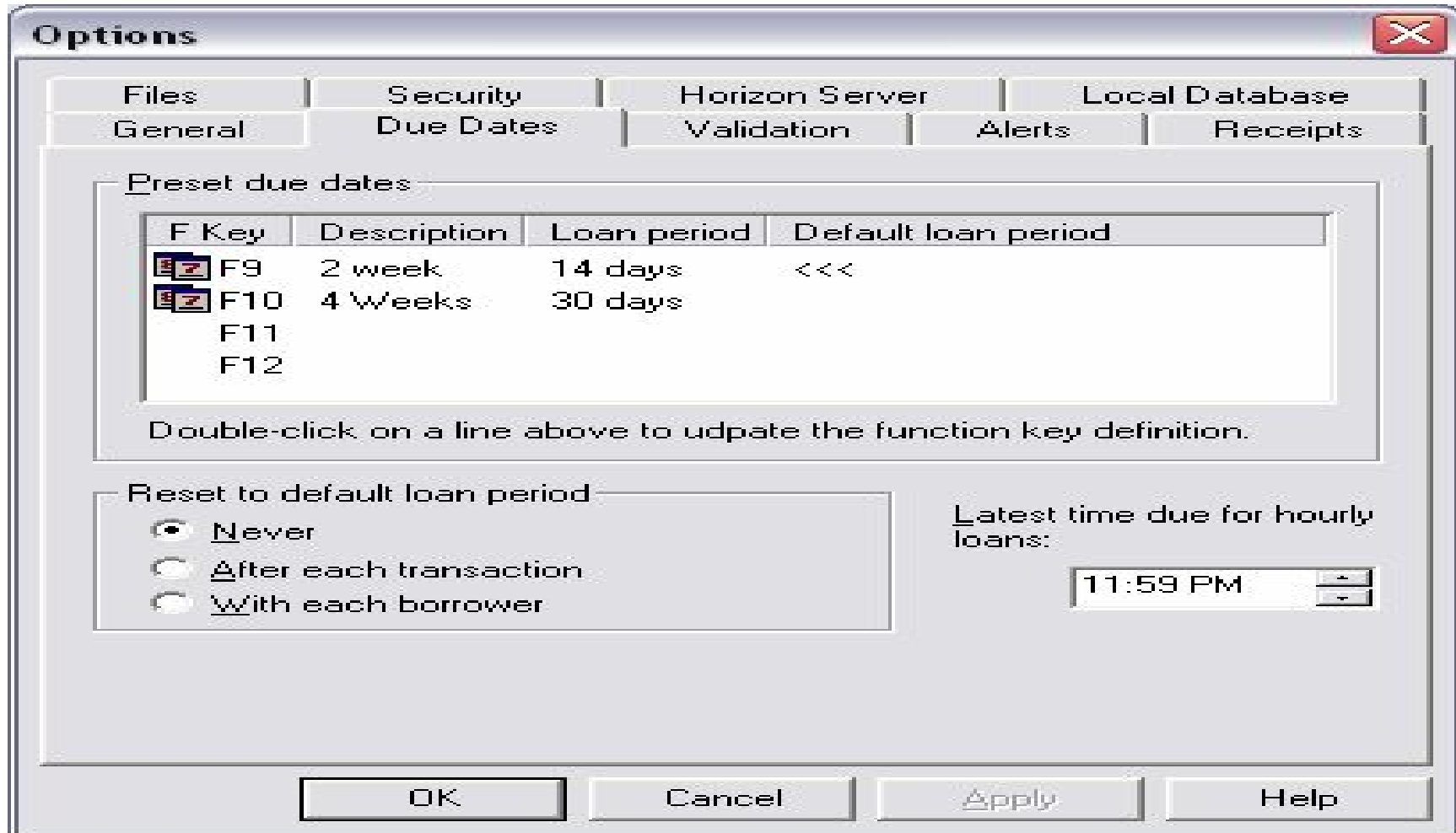
Default due date – Double click on time – Check next to "Make this the default loan"

Scan Borrower Barcode

Scan in Items

Checkin –

Toggle between checkout/checkin = F3 or blue/yellow
arrow icon

Upload data to Horizon – Circulation>Off-line Circ Upload Utility
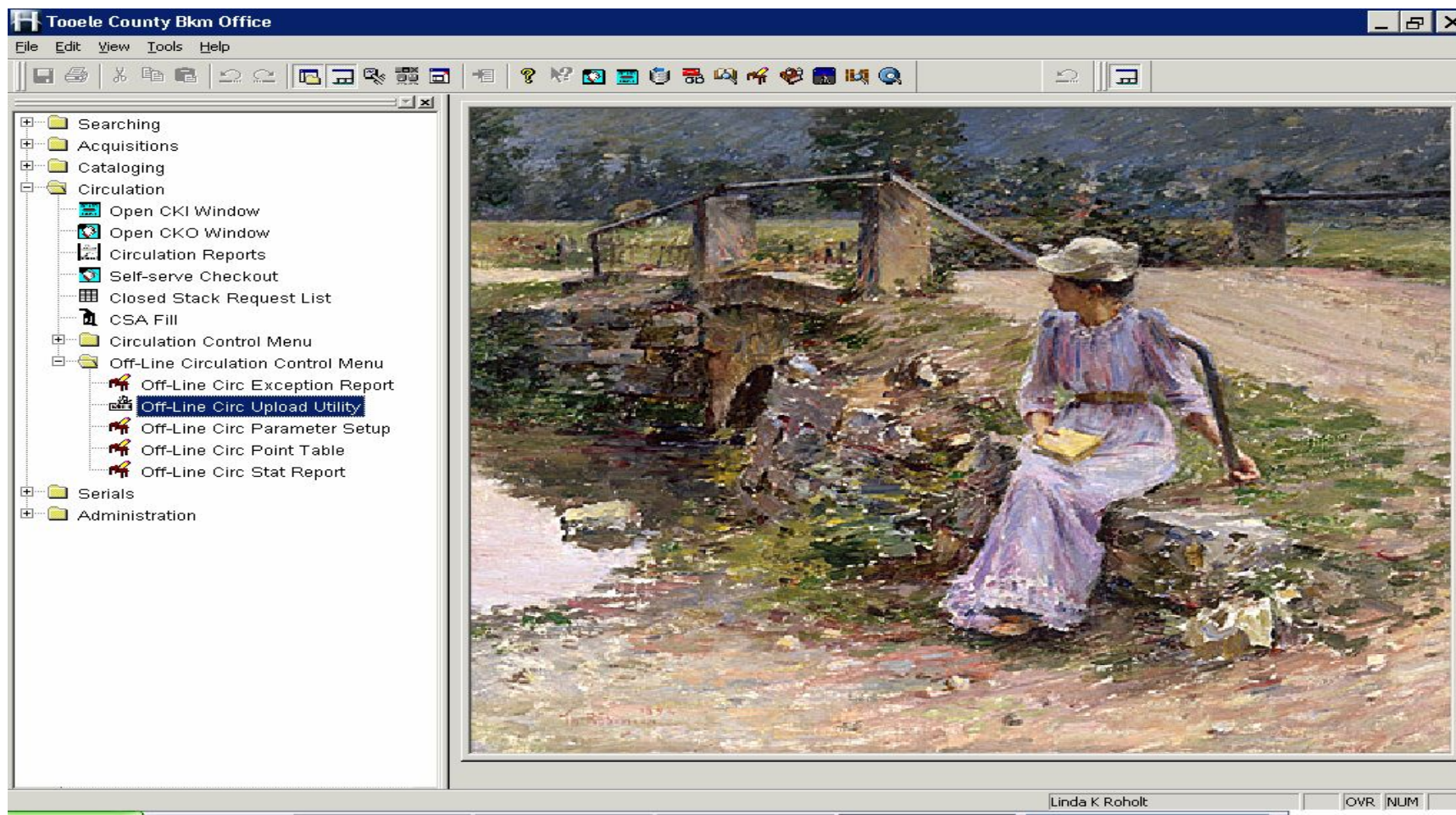
File – Upload Transaction File
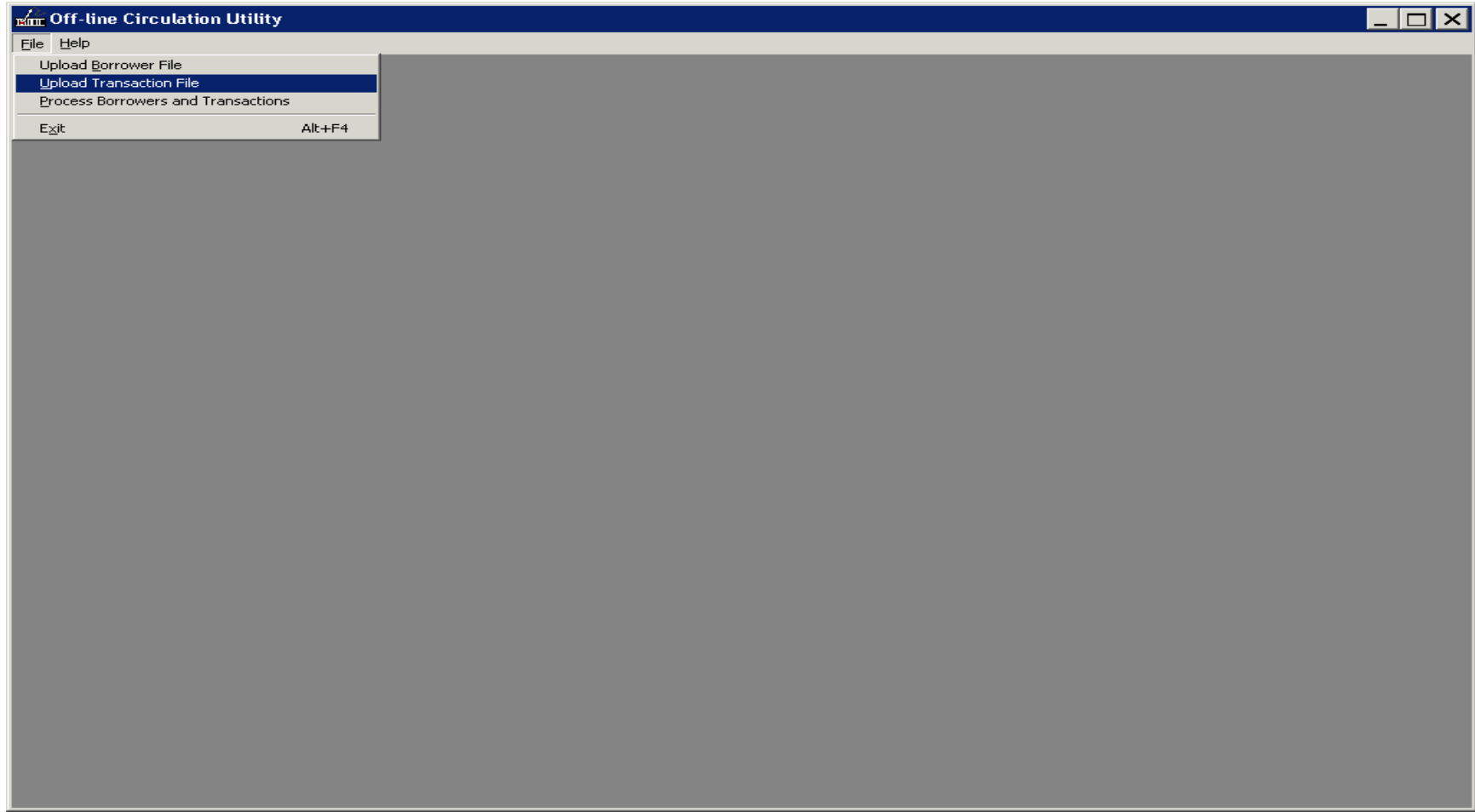
C: Program files/epixtech/pc reliance/data/reliance

Done uploading offline Circ.

Off-line Circulation Utility

File   Help

100% done uploading Offline Circulation transactions.
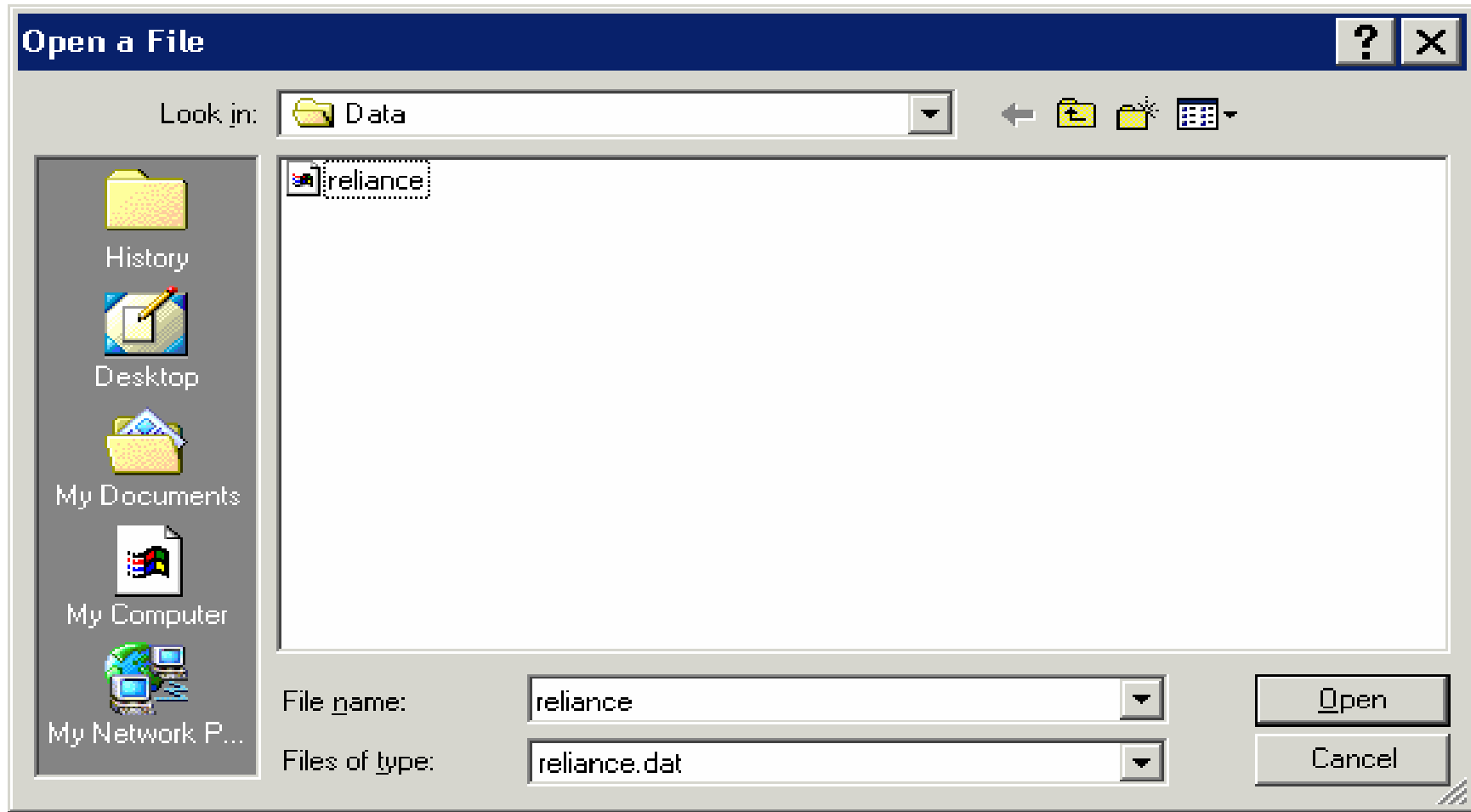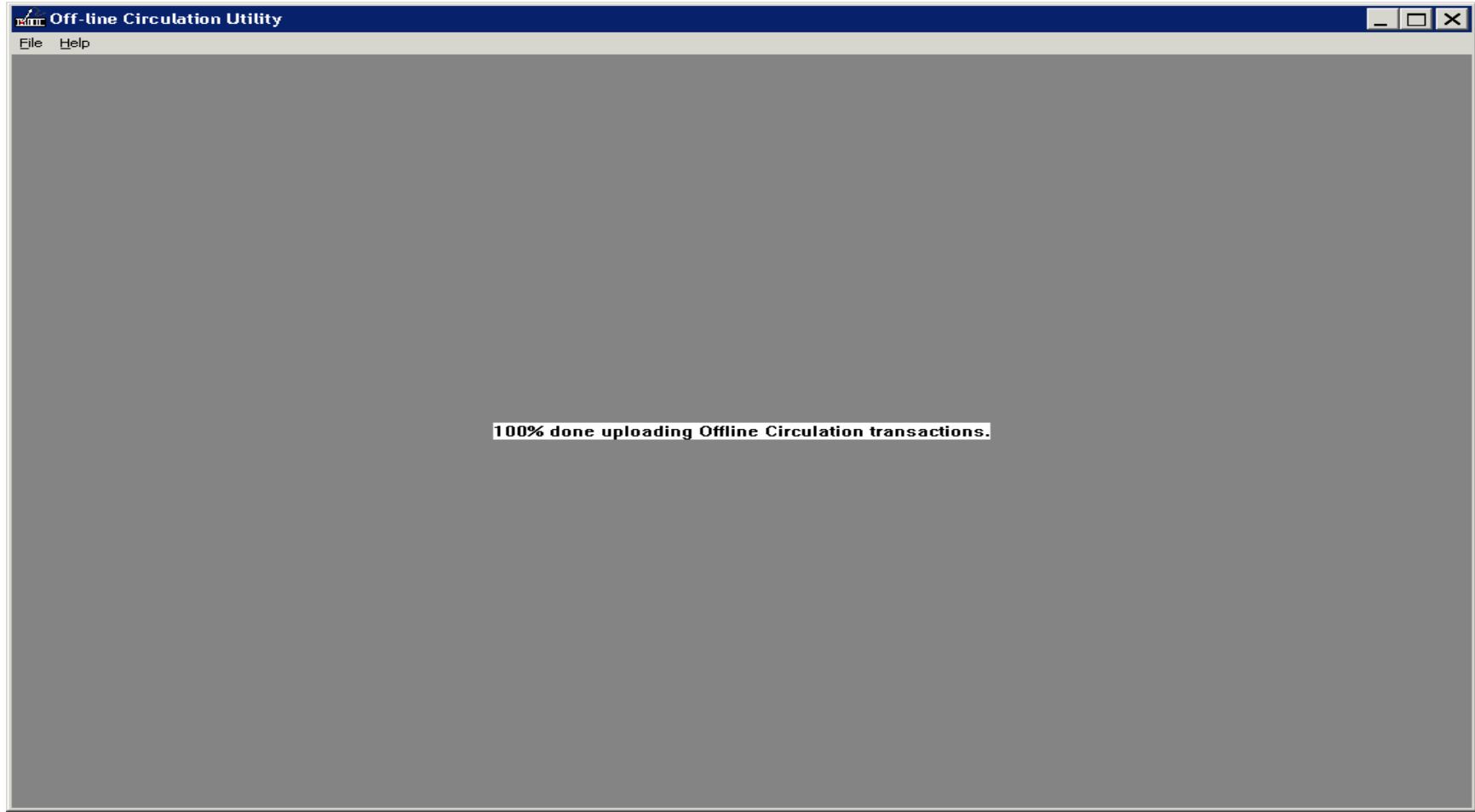
Process transaction file (File>process transactions)

Click OK

If ALL current Offline Circulation files have been uploaded to the server, press OK to proceed with processing; if not, press Cancel.

OK · Cancel

Summary of Process

Process Summary

6 transaction record(s), 4 checkout(s), 2 checkin(s), 2 exception(s). See the 'Offline Circulation Exceptions' view in the table editor; exception numbers 3628 thru 3629.

OK
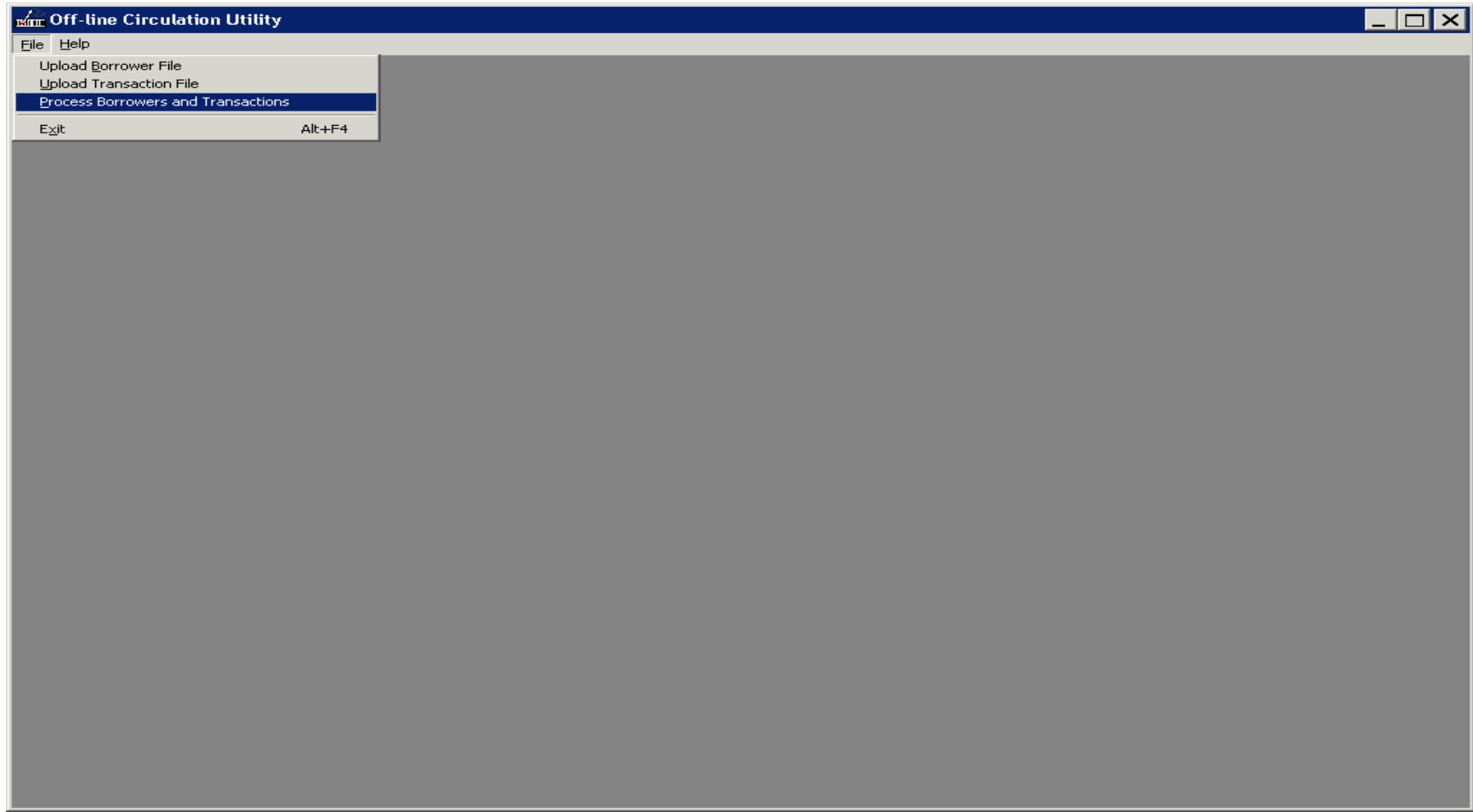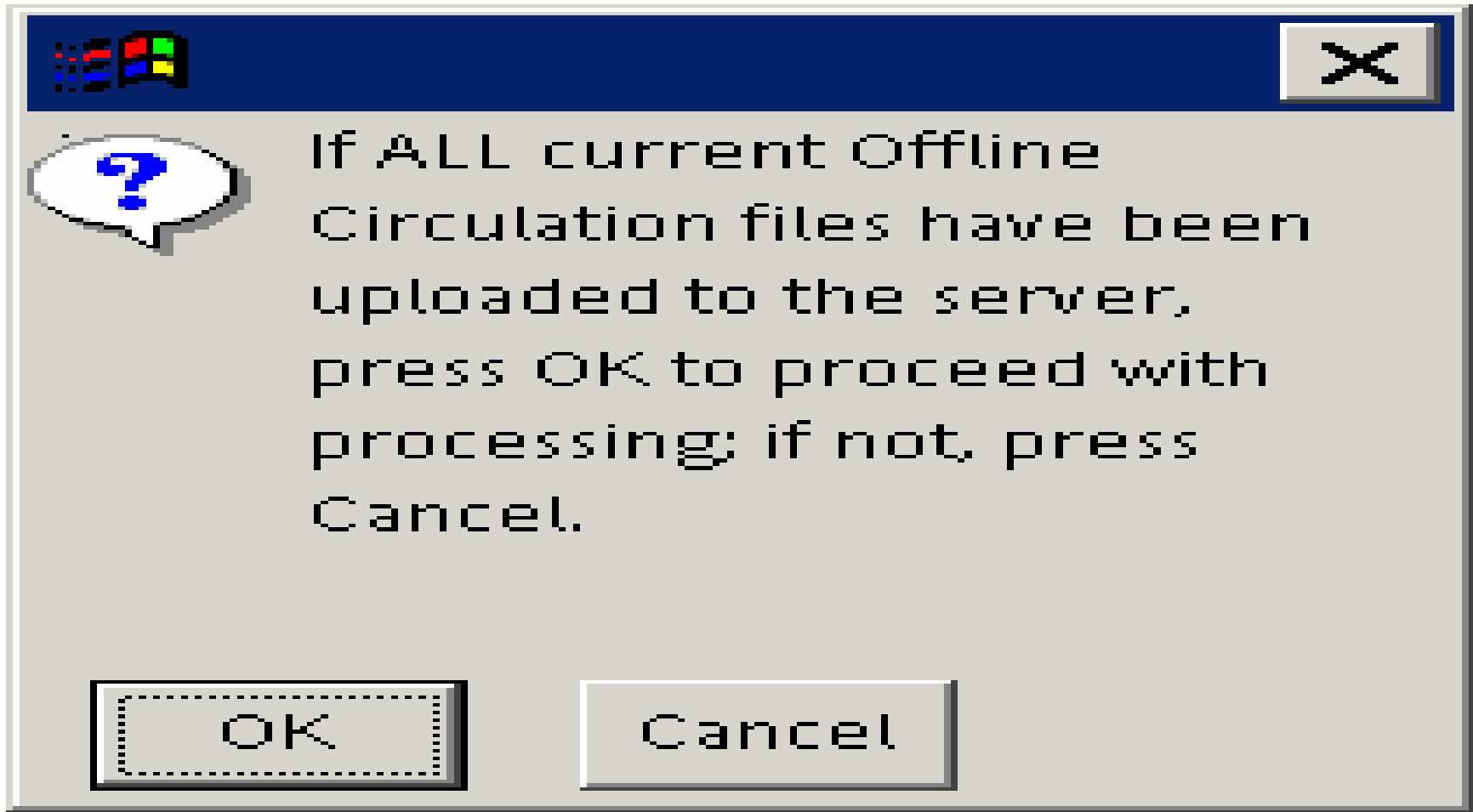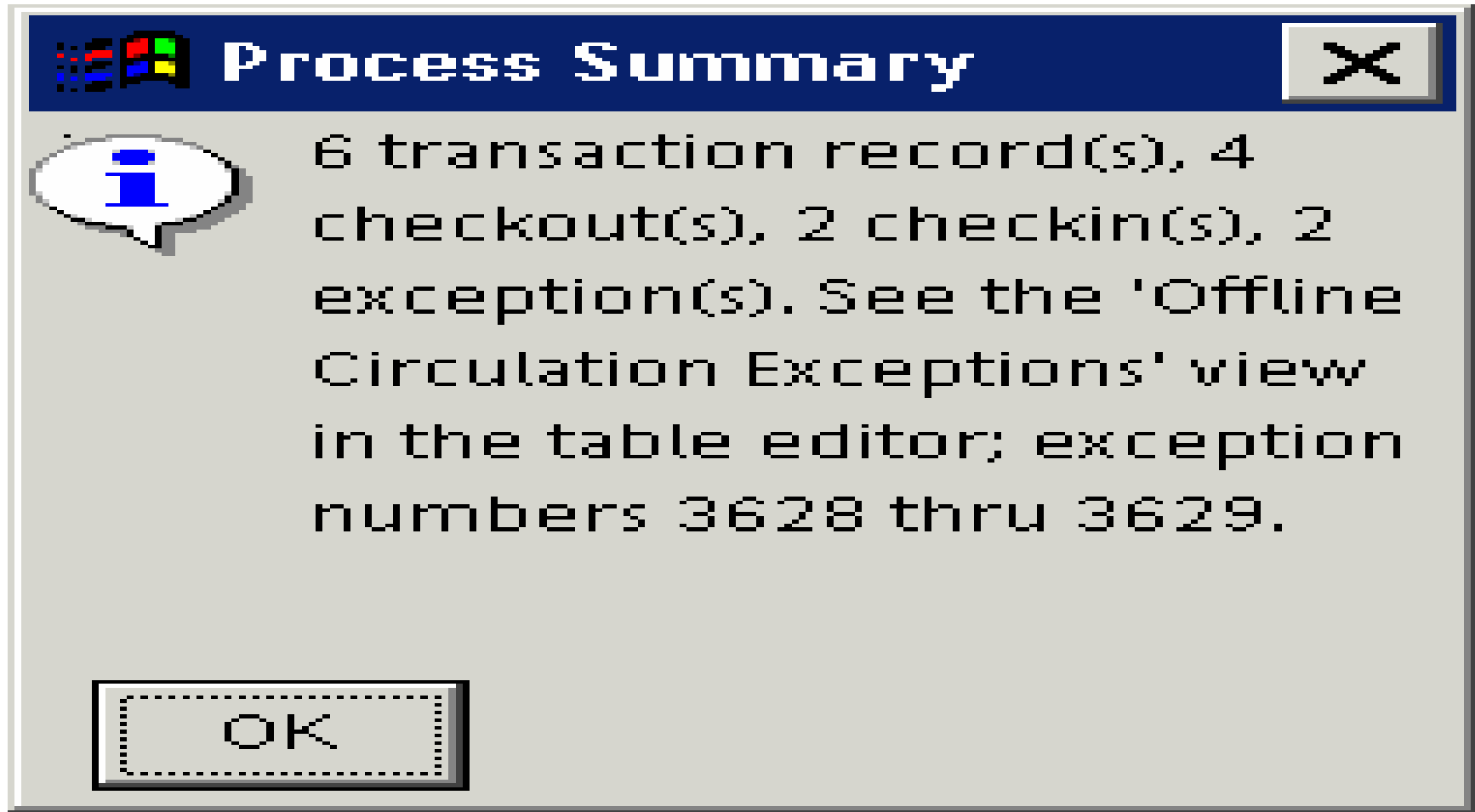
View Exception Report

Exception report is for all Bookmobile locations on the database – use the Sort

Sort screen – choose process date and check descending sort - OK

Choose Sort Columns

Choose up to 15 columns

- Process Date
- No.
- Trans.
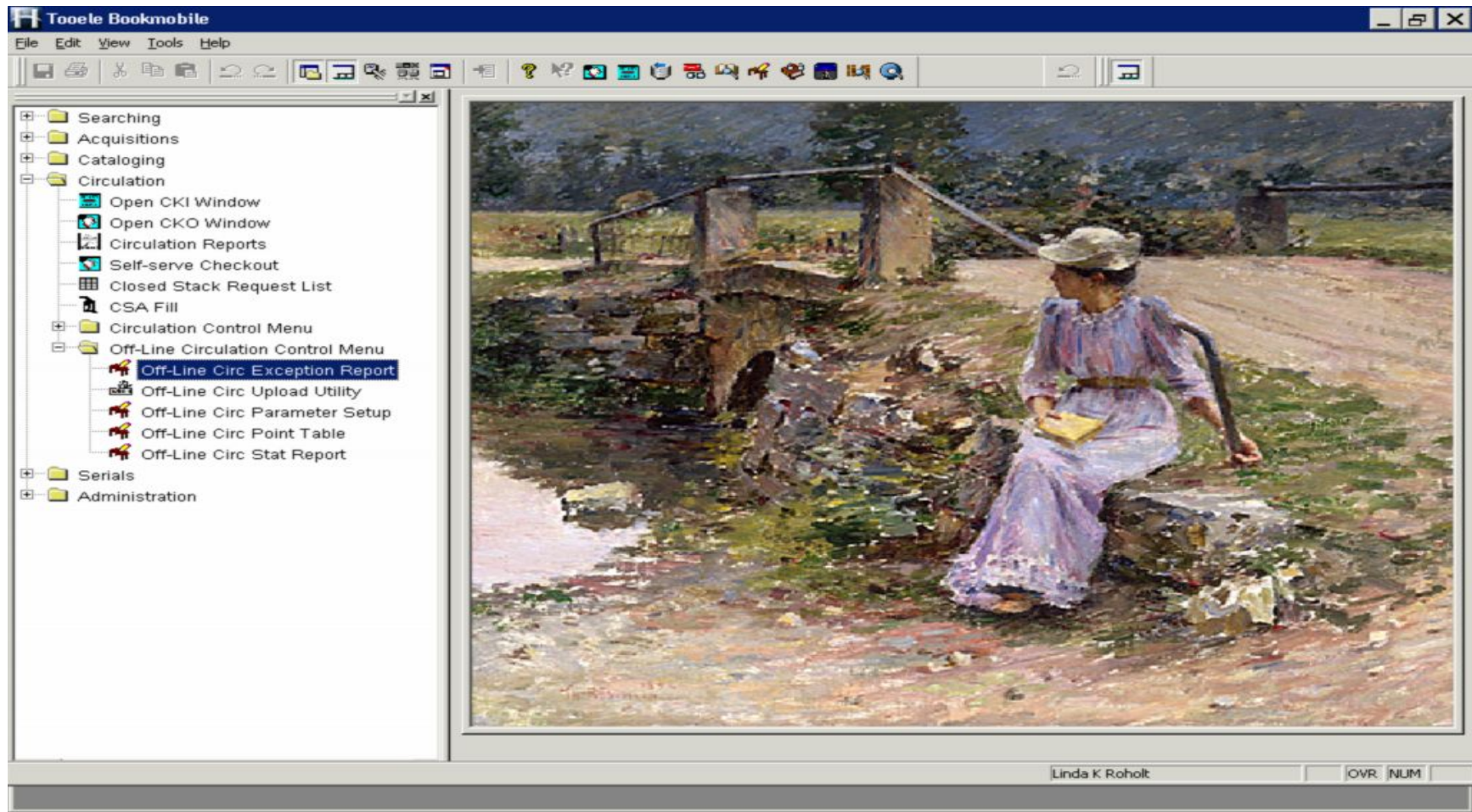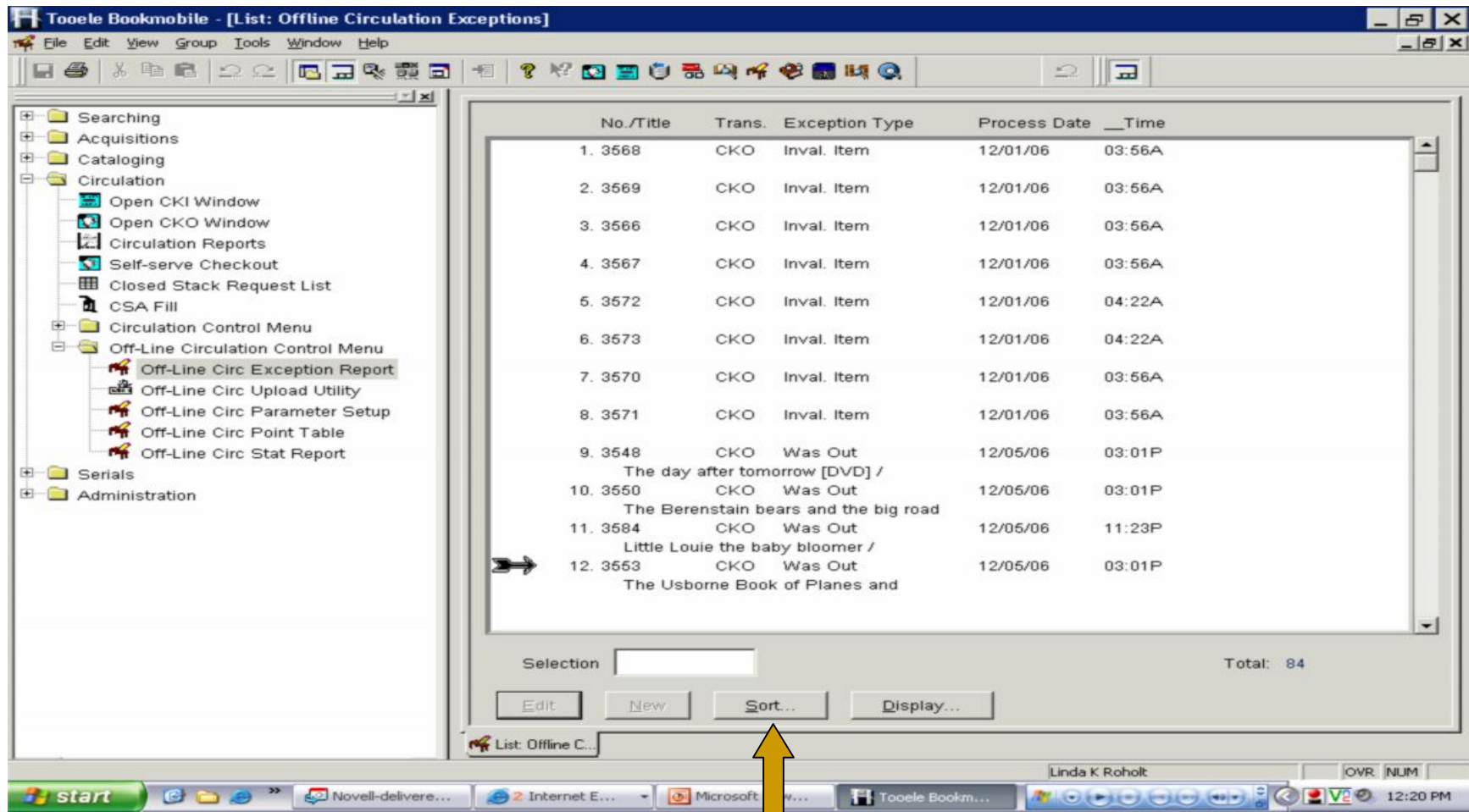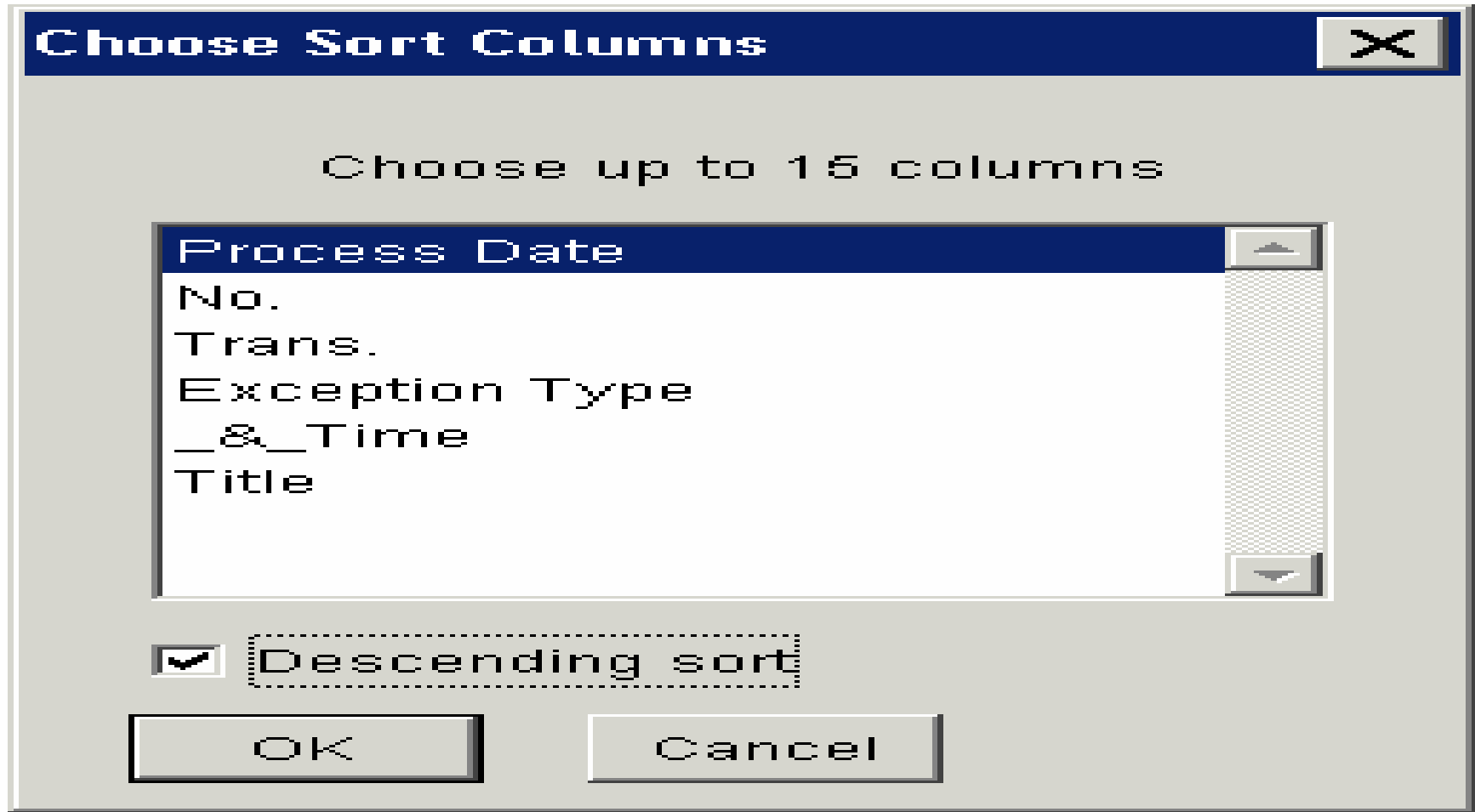- Exception Type
- _&_Time
- Title

☑ Descending sort

[OK]   [Cancel]

The reason for the exceptions are because the checkin (CKI) items are in transit

Tips

- Option - wait to checkin items until system is live
- Blocks and transit information will be on exception report if checkin is used with offline circulation
- If you do checkouts and checkins on the same computer the information will be timestamped
- If checkouts are done on 1 computer and checkins are done on a different computer then the checkin file must be uploaded first
- If a new patron is needed to be added while using offline circulation – fill out the application form and then use the new barcode with offline circualtaion – Make sure to add the new borrower to Horizon before uploading the offline circulation file.

Questions?

- Contact Ruthanne Hansen at 801- 715-6758 or Linda Roholt at 801- 715-6754 – Toll free in Utah is 1-800-662-9150